

In addition, except as provided in this section, care managers employed by the lead agency or serving under contracts with the lead agency, who are newly employed in or newly assigned to Community Options after December 31, 1994 shall have:

1. A BA/BS degree preferably in a health or human services related field (this does not include a registered nurse degree of less than four years), or
2. Any combination of four (4) years of post-secondary education and experience, either in long term support (preferred) or other human services, may be substituted for the degree requirements with prior Department approval. (Exceptions will be limited to persons adjudged to be otherwise especially well qualified to provide long term support care management, for example an individual with an AODA certification who will provide care management to AODA participants only, or a bi-lingual/bi-cultural care manager who will provide services to bi-lingual/bi-cultural participants.

D. Care Management
Supervisor
Qualifications

Care management supervisors employed by the lead agency or under contract with the lead agency, who are newly employed in or newly assigned to Community Options shall have:

1. A minimum of a Master's degree preferably in a health or human services related field and at least two (2) years experience in care management (care management experience in the area of long term support is preferred but not required), and successful completion of a course in supervision within the first year of hire, or
2. A minimum of a BA/BS degree preferably in a health or human services related field and at least four (4) years experience in care management (care management experience in the area of long term support is preferred but not required), and successful completion of a course in supervision within the first year of hire.

E. Training Requirements

1. Initial Training Requirements
 - a. **All care managers hired after January 1, 2006 shall complete the Department provided Long-Term Support Orientation training packet within six months of hire.**

- b. **Currently employed care managers who were unable to attend the LTC COP Core Course shall complete the LTS Orientation training packet by October 2006.**

2. Ongoing Training Requirements

- a. After December 31, 1994, all COP care managers shall receive a minimum of 30 hours every two years of ongoing training approved by the department.
- b. The lead agency, in accordance with its training plan (see Section 2.03 D 15), shall provide training opportunities to care managers in areas such as COP philosophy and values, program requirements, care management process and tools, interviewing skills, serving specific target populations, how to access resources, protective services, elder abuse and neglect, time management, and local policies and procedures including job expectations, record keeping and administration, and the role and function of county boards and committees.

5.02 Minimum Allowable Care Management Staff to Participant Ratio

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| A. Authority | The Department is required to establish standards for the minimum allowable care management staff to participant ratio (caseload size standard). 346.27 (6d) |
| B. Individualized Allowable Minimum Allowable Minimum Staff to Participant Ratio | <p>The lead agency shall:</p> <ul style="list-style-type: none"> 1. Complete a Community Options Annual Care Management Capacity Report (see Appendix E) each year; 2. Maintain the minimum average staff to participant ratio standard established for the agency through the Care Management Caseload Size Worksheet process; 3. Develop and implement a plan through the annual Community Options Plan Update process (see Sections 3.02 C and 3.03) to achieve the standard if it is not currently within the allowable tolerance limits (see Section 5.02 D) and has not been granted a variance (see Section 5.02 F). |